



Maintaining a Healthy Money Mindset

It's hard to find any good news about finance these days. Market forecasters are starting to use the dreaded “r” word to describe the economy and headline after headline is doom and gloom.

A healthy wealth mindset can help you keep your eye on the prize even when the market flinches.

You can always reach out to discuss more detailed ways to boost your wealth-building approach with deep industry knowledge. But for now, let's go over the four key traits of a healthy money mindset.

1. Your Goals Are Organized (and Saving Is One of Them)

You know your top three financial goals for the next year, five years, and 10 years, and you can rank them by difficulty or priority. The action of saving is one of your goals rather than a means of accomplishing other goals, which helps you maintain financial flexibility.

2. You Keep a Pulse on the Present

You're proactive rather than reactive with your finances. Perhaps you regularly check in on key accounts or you keep tabs on the market factors that can influence them (e.g., interest rates, inflation), which lets you know when to re-examine your strategy.

3. You Take Time When Making Decisions

No matter how big or small, it's tough to make decisions under pressure. Those with healthy financial mindsets ensure their thoughts and feelings remain consistent by revisiting the topic at a later time, whether that's in a few hours, overnight or next week.

4. You're Future-Focused

Is your estate plan up to date? Have recent legislative or economic happenings increased future retirement expenses? With a healthy money mentality, you know that now is the best time to review these details to keep a steady path toward a bright future.

Have questions about your wealth-building strategy? Reach out to get personalized answers.

The highest Compliment you can give your ROI Financial Advisor is to refer them to someone special like yourself. We thank you for your business & most recent consideration.



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We help clients get back to the basics of building & maintaining wealth in a tax efficient way.



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